



## 2002-2003 CFS Data Form

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Advisor Name and Rep ID Number: \_\_\_\_\_

Sponsor Name and Rep ID Number: \_\_\_\_\_

DBA Name (if any): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Next appointment with client (date): \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



## 2002-2003 CFS Data Form

### General Information

**Student Name:** \_\_\_\_\_  
First name, middle initial, last name.

**Home Phone:** ( \_\_\_\_\_ ) \_\_\_\_\_ **Parents Work Phone:** ( \_\_\_\_\_ ) \_\_\_\_\_

**Address, City, State, ZIP:** \_\_\_\_\_

**Students Date of Birth:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ **Date of State Residency:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**License Number:** \_\_\_\_\_ **State Issued:** \_\_\_\_\_  
Enter the student's drivers license number. Enter the state that issues the student's driver's license.

**Any Drug Offenses:**  Yes  No Has the student ever been convicted of a drug offense?

**Pre-College Siblings:** \_\_\_\_\_  
Enter name and age of each of the pre-college children excluding the student.

**U.S. Citizen:** \_\_\_\_\_ **Alien Registration #:** \_\_\_\_\_  
Enter citizen, eligible non-citizen or non-citizen. Enter the student's alien registration #. Enter a N/A if not applicable.

**Sex of Student:**  Male  Female **Orphan/Ward of Court:** \_\_\_\_\_  
Indicate male or female. Is the student a ward of the court or was the student a ward until age 18?

**Number in Family:** \_\_\_\_\_  
Enter the student's number of family members. List parents and any children or others that get more than half their support from the STUDENT.  
Enter N/A if not applicable.

**Number of Dependents:** \_\_\_\_\_ **Marital Status and Date:** \_\_\_\_\_  
Student's dependents. This is any children or others that get more than half their support from the STUDENT. Enter N/A if not applicable.

**Number in College:** \_\_\_\_\_  
Enter the number of family members who will attend college at least half time in the student's next year in college. Always include the student.

**SAT Score:** \_\_\_\_\_ **GPA:** \_\_\_\_\_  
Enter the student's SAT score. Enter the student's Grade Point Average.

**Semester student will enter college:** \_\_\_\_\_ **Grade Level This Fall:** \_\_\_\_\_  
Enter the semester date student will be entering college.

### Parents General Information

**Father's Name:** \_\_\_\_\_  
Enter FULL name. Enter N/A if not applicable.

**Father's Date of Birth:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ **Father's Social Security #:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Use mm/dd/yy format.

**Mother's Name:** \_\_\_\_\_  
Enter FULL name. Enter N/A if not applicable.

**Mother's Date of Birth:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ **Mother's Social Security #:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Use mm/dd/yy format.

**Student's Social Security #:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ **Parent's Marital Status:** \_\_\_\_\_  
From tax return. Enter the parent's marital status as of the day the FAFSA is signed.

**Father's Education Level:** \_\_\_\_\_ **Mother's Education Level:** \_\_\_\_\_  
Enter the highest education level attained by the parent's. Some high school, high school grad, some college, college grad, advanced degree.

**Parent's Email Address:** \_\_\_\_\_



## 2002-2003 CFS Data Form

### Student Income and Benefit Information

**Tax Form:** \_\_\_\_\_

Enter 1040, 1040EZ, 1040A, 1040TEL, 1040PC, None.

**Adjusted Gross Income:** \_\_\_\_\_

Form 1040-line 33, Form 1040A-line 19 or Form 1040EZ-line 4.

**Student Earned Income:** \_\_\_\_\_

For tax filers enter the amount from Form 1040-line 7, 12 and 18, Form 1040A-line 7 or 1040EZ-line 1. Non tax filers enter the earnings from W-2.

**Number of Exemptions:** \_\_\_\_\_

Form 1040 and 1040 A - line 6d.

**Student's Interest/Dividend Income:** \_\_\_\_\_

Form 1040 - line 8a and line 9.

**Filing Status:** \_\_\_\_\_

Single, Married-Jointly, Married-Separately, Head of Household

**Federal Income Tax Paid:** \_\_\_\_\_

Form 1040-line 51 or Form 1040EZ-line 10.

**Spouse Earned Income:** \_\_\_\_\_

**Tax Exempt Interest Income:** \_\_\_\_\_

1040, line 8b.

**Cash Paid on Behalf:** \_\_\_\_\_

Cash or any money paid on the student's behalf not reported elsewhere.

### Parent Income and Benefit Information

**Tax Form:** \_\_\_\_\_

Enter 1040, 1040EZ, 1040A, 1040TEL, 1040PC, None.

**Filing Status:** \_\_\_\_\_

Single, Married-Jointly, Married-Separately, Head of Household

**Father Earned Income:** \_\_\_\_\_

Enter the earnings from W-2 forms.

**Number of Exemptions:** \_\_\_\_\_

Form 1040 and 1040 A - line 6d or Form 1040EZ-line 5.

**Interest Income:** \_\_\_\_\_

Form 1040 and 1040A - line 8a

**Tax Exempt Interest Income:** \_\_\_\_\_

Form 1040 or 1040A - line 8b.

**Itemized Deductions:** \_\_\_\_\_

Enter the number from Form 1040 - line 36.

**Adjustment to Income:** \_\_\_\_\_

Enter the number from Form 1040 - line 32.

**Elem/Secondary Tuition Paid:** \_\_\_\_\_

Enter the amount of elementary and secondary school tuition that was paid in 2000. (Excluding Student).

**Mortgage/Rent Payment:** \_\_\_\_\_

Enter monthly mortgage or rent payment for the primary residence.

**Child Support Received:** \_\_\_\_\_

Child support received or paid for ALL children. Don't include foster care or adoption payments.

**Housing Allowances:** \_\_\_\_\_

Housing, food and other living allowances paid to members of the military, clergy and others including cash payments and the cash value of benefits.

**Hope Credit:** \_\_\_\_\_

Enter the amount from Form 1040-line 46, Form 1040A-line 29 that is for the Hope Credit.

**Tax Year Reviewed:** \_\_\_\_\_

Enter the year for which the current tax return was filed.

**Adjusted Gross Income:** \_\_\_\_\_

Form 1040-line 33, Form 1040A-line 19 or Form 1040EZ-line 4.

**Mother Earned Income:** \_\_\_\_\_

Enter the earnings from W-2 forms.

**Federal Income Tax Paid:** \_\_\_\_\_

Form 1040-line 51, Form 1040A-line 33 or Form 1040EZ-line 10.

**Dividend Income:** \_\_\_\_\_

1040, line 9.

**Net Income Business/Farm:** \_\_\_\_\_

Enter the number from Form 1040 - line 12, 17, and 18

**Other Income:** \_\_\_\_\_

Enter the number from Form 1040 - line 13, 14, 15b, 16b, 19, 20b, 21

**Medical/Dental Expenses:** \_\_\_\_\_

Enter the amount of unreimbursed medical and dental expenses.

**Number of Student's paid for:** \_\_\_\_\_

**Contributions to Retirement Accounts:** \_\_\_\_\_

Contributions to 401(k), 403(b), IRA, etc.

**Child Support Paid:** \_\_\_\_\_



## 2002-2003 CFS Data Form

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### Student Asset Information

Enter net asset value (asset value - asset debt)

Checking: \_\_\_\_\_

Savings: \_\_\_\_\_

Certificates of Deposit: \_\_\_\_\_

T Bills: \_\_\_\_\_

Money Market: \_\_\_\_\_

Mutual Funds: \_\_\_\_\_

Stocks: \_\_\_\_\_

Bonds: \_\_\_\_\_

Trusts: \_\_\_\_\_

Home Purchase Price: \_\_\_\_\_

Life Insurance (cash value): \_\_\_\_\_

Annuity: \_\_\_\_\_

IRA: \_\_\_\_\_

Retirement Accounts: \_\_\_\_\_

Other: \_\_\_\_\_

Custodial Accounts: \_\_\_\_\_

Total Sibling Assets: \_\_\_\_\_

Exempt Bonds: \_\_\_\_\_

Home Market Value: \_\_\_\_\_

Year Home Bought: \_\_\_\_\_

### Parent Asset Information

Enter net asset value (asset value - asset debt)

Checking: \_\_\_\_\_

Savings: \_\_\_\_\_

Certificates of Deposit: \_\_\_\_\_

T Bills: \_\_\_\_\_

Money Market: \_\_\_\_\_

Mutual Funds: \_\_\_\_\_

Stocks: \_\_\_\_\_

Bonds: \_\_\_\_\_

Exempt Bonds: \_\_\_\_\_

Trusts: \_\_\_\_\_

Limited Partnerships: \_\_\_\_\_

Business: \_\_\_\_\_

Included Farm: \_\_\_\_\_

Real Estate Value #1: \_\_\_\_\_

Real Estate Debt #1: \_\_\_\_\_

Year Purchased #1: \_\_\_\_\_

Purchased Price #1: \_\_\_\_\_

#1 Income Producing? \_\_\_\_\_

Life Insurance (cash value): \_\_\_\_\_

Annuity: \_\_\_\_\_

IRA: \_\_\_\_\_

Retirement Accounts: \_\_\_\_\_

Other: \_\_\_\_\_

Custodial Accounts: \_\_\_\_\_

Sibling Prepaid Tuition Plans: \_\_\_\_\_

Student Prepaid Tuition Plans: \_\_\_\_\_

Home Market Value: \_\_\_\_\_

Home Debt: \_\_\_\_\_

Additional Home Debt: \_\_\_\_\_

Home Purchase Price: \_\_\_\_\_

Year Home Bought: \_\_\_\_\_

Real Estate Value #2: \_\_\_\_\_

Real Estate Debt #2: \_\_\_\_\_

Year Purchased #2: \_\_\_\_\_

Purchased Price #2: \_\_\_\_\_

#2 Income Producing? \_\_\_\_\_



## 2002-2003 CFS Data Form

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College #1: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #2: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #3: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #4: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #5: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #6: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #7: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #8: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #9: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #10: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #11: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #12: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #13: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

College #14: \_\_\_\_\_  
Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_



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Received the amount of: \_\_\_\_\_ Paid by Check #: \_\_\_\_\_

Credit Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Signature: \_\_\_\_\_

### Service Requested

High School Students:

Senior

Junior

Sophomore

Freshman

College Students:

Senior

Junior

Sophomore

Freshman

Representative Name and ID#: \_\_\_\_\_



## 2002-2003 CFS Data Form

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### Referral Sheet

Name: \_\_\_\_\_ Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name & Grade of Student(s): \_\_\_\_\_ Name & Grade of Student(s): \_\_\_\_\_

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Name: \_\_\_\_\_ Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name & Grade of Student(s): \_\_\_\_\_ Name & Grade of Student(s): \_\_\_\_\_

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Name: \_\_\_\_\_ Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name & Grade of Student(s): \_\_\_\_\_ Name & Grade of Student(s): \_\_\_\_\_

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Name: \_\_\_\_\_ Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name & Grade of Student(s): \_\_\_\_\_ Name & Grade of Student(s): \_\_\_\_\_

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